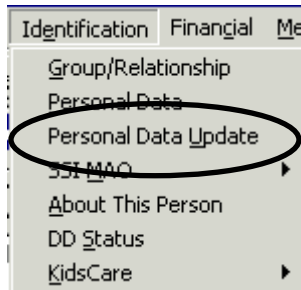# Personal Data Update

1. Introduction

The **"Personal Data Update"** window is used to make certain changes in ACE without requiring a disposition to the case. To locate the **"Personal Data Update"** update, click on **"Identification"** on the drop down menu, then click on **"Personal Data Update"**.

The **"Personal Data Update"** window cannot be used if the case is inactive or there is an open or future control date. The window will give you a warning if this occurs.
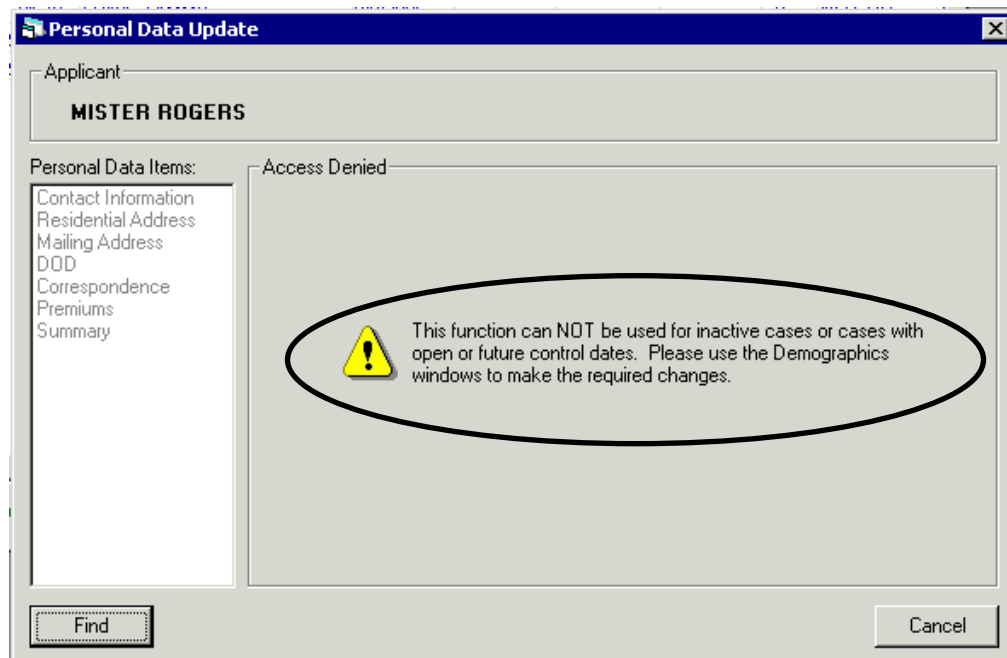
The **"Personal Data Update"** window allows you to do changes without dispositioning the case. There are seven different grids on the **"Personal Data Update"** window. These grids are:

- **Contact Information**
- **Residential Address**
- **Mailing Address**

- **DOD** (Not used for KidsCare)
- **Correspondence**
- **Premiums**
- **Summary**

To navigate between the different grids, click on the name of the grid to get to the change you want to make.

Each grid has a **"Group List"** drop down list of all the members of the household.

Group list

2. Contact Information

The first grid that you can do a change on is the **"Contact Information"** grid. The contact information is the home, cell/pager or business number of the customer.

Contact Information

There are three fields in the **"Contact Information"** grid. They are:

- **Home**   Enter the home phone number.

- **Cell/Pager**   Enter the cell phone number or pager number.

- **Business**   Enter the business number.

Select each individual in the household and enter the new home number, cell/page number and/or business number. Click the **"Apply"** button after the phone number has been change for each individual.

3. Residential Address

The second grid that you can do a change on is the **"Residential Address"** grid. This allows you to change the residential address for the entire household or individual. You can also change the mailing address, if the mailing address is the same as the residential address.

!	**Note:** Do not use the Personal Data Update window to update the residential address if the customer moved to a new address in a different county. The customer may need to select a new health plan and you will need to create a change boundary and disposition the change.

There are eight different fields on the **"Residential Address"** grid. They are:

- **Street 1**   Enter the first line of the street address of the customer's residential address.

- **Street 2**   Enter the second line of the street address of the customer's residential address, if applicable.

- **City**   Enter the city the customer moved to.

- **Zip**   Enter the zip code the customer moved to. If the customer moved outside of their previous county, do not use the **"Personal Data**

Update" window.

- **E-mail**   Enter the customer's e-mail address, if applicable.

- **Household**   If checked, applies the changes to the residential address to the entire household.

- **Person…**   If checked, brings up a pop up window that allows you to apply changes to certain individuals in the household.

- **Residence**   If checked, applies the residential address to the mailing address.

Once all applicable changes to the residential address have been made, click the **"Apply"** button.

Once the **"Apply"** button has been checked, you will receive the following pop up.

4. Mailing Address

The third grid that you can do a change on is the **"Mailing Address"** grid. This allows you to change the mailing address, if the mailing address is different than the residential address.

There are eight different fields on the **"Mailing Address"** grid. They are:

- **Street 1**   Enter the first line of the street address of the customer's mailing address.

- **Street 2**   Enter the second line of the street address of the customer's mailing address, if applicable.

- **City**   Enter the city the customer moved to.

- **Zip**   Enter the zip code the customer moved to.

- **Household**   If checked, applies the changes to the mailing address to the entire household.

- **Person…**   If checked, brings up a pop up window that allows you to apply changes to certain individuals in the household.

- **Residence**   If checked, applies the mailing address to the residential address.

Street 1
Street 2
City
Zip
Person…
Residence
Household

Once all applicable changes to the mailing address have been made, click the **"Apply"** button.

Apply

Once the **"Apply"** button has been checked, you will receive the following pop up.

5. DOD

This grid is not used by KidsCare because eligibility of the entire household needs to be re-evaluated.

6. Correspondence

The next grid that you can do a change on is the **"Correspondence"** grid. This allows you to change the correspondence language from either English to Spanish or vice versa. The correspondence language only needs to changed for the primary informant.

The only item on the **"Correspondence Language"** is the **"Correspondence Language"** drop down, which has the choice of English and Spanish.

Once all applicable changes to the correspondence language have been made, click the **"Apply"** button.

7. Premiums

Another grid that you can do a change on is the **"Premiums"** grid. When the customer is automatically approved from TIPS, a notice is mailed to the customer with a survey asking whether the customer is willing to pay a premium. When the customer returns the premium survey indicating that they are willing to pay a

premium, this final type of change allows you to indicate whether the customer is willing to pay a premium.

Personal Data Update (IKE CEDA - APPLICANT - 100278112)

Primary Informant

GILL CEDA   **Sep 2006**

Personal Data Items:

Contact Information
Residential Address
Mailing Address
DOD
Correspondence
Premiums
Summary (0)

Premium

Group list: IKE CEDA

Willing to pay premium:

○ Yes   Verified:
○ No
○ UnKnown

Apply to: ☐ All applicants   Apply

Find   Cancel

Premium

The **"Premiums"** grid contains a grid and one field. They are:

- **Willing to pay premium** Enter the result of the premium survey. If the customer is willing to pay a premium for the individual on the group list, click on the **"Yes"** radio button. If the customer is not willing to pay a premium for the individual on the group list, click on the **"No"** radio button.

- **All applicants** Check this box if the result of the premium survey is the same for the entire household.

Willing to pay premium

All applicants

Once all applicable changes to the premium have been made, click the **"Apply"** button.
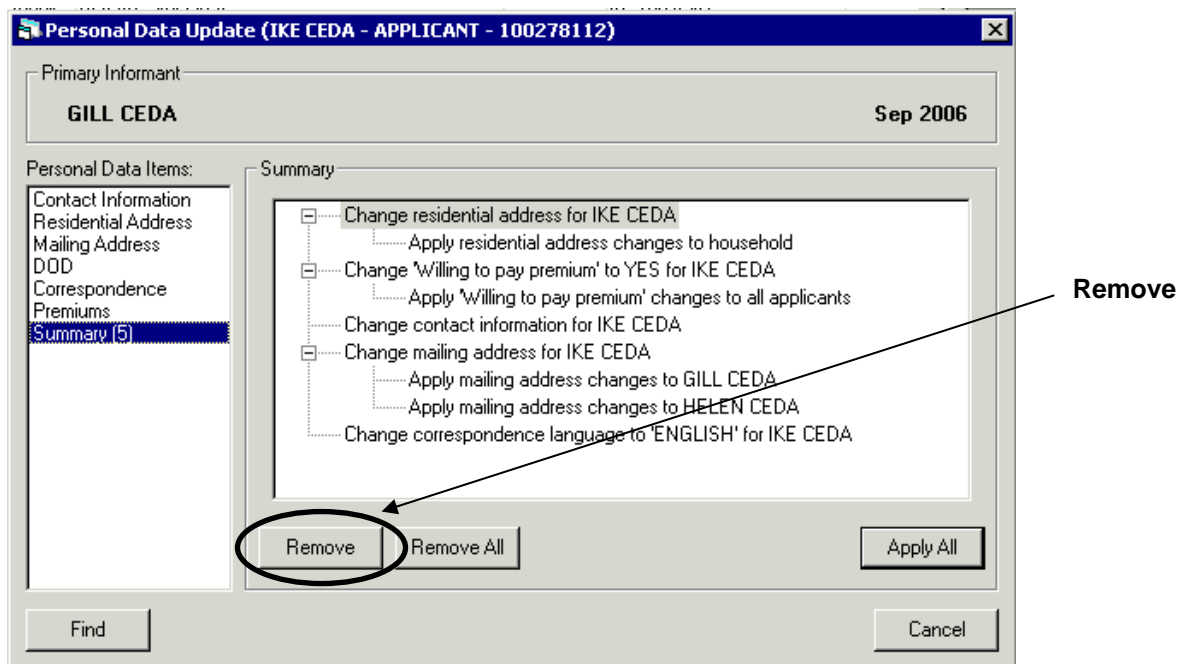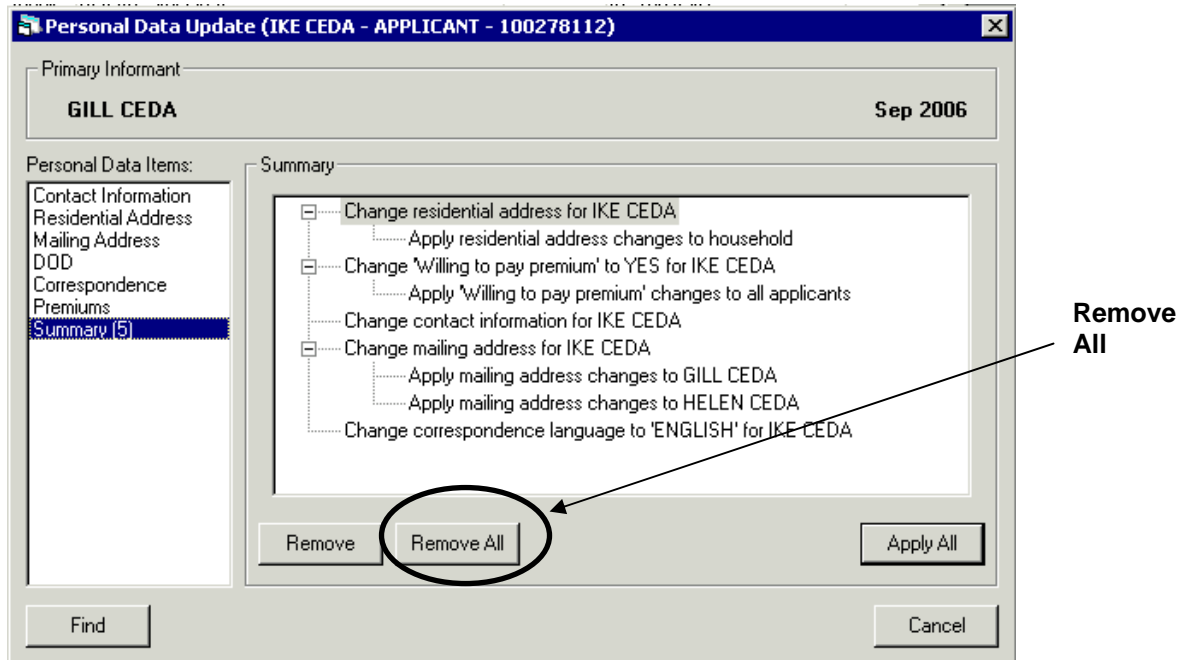

Apply

8. **Summary**

The last grid is the **"Summary"** grid. The summary displays the list of all the changes that you made on the **"Personal Data Update"** window. The summary allows you review all the changes and decide whether to remove them or apply them.
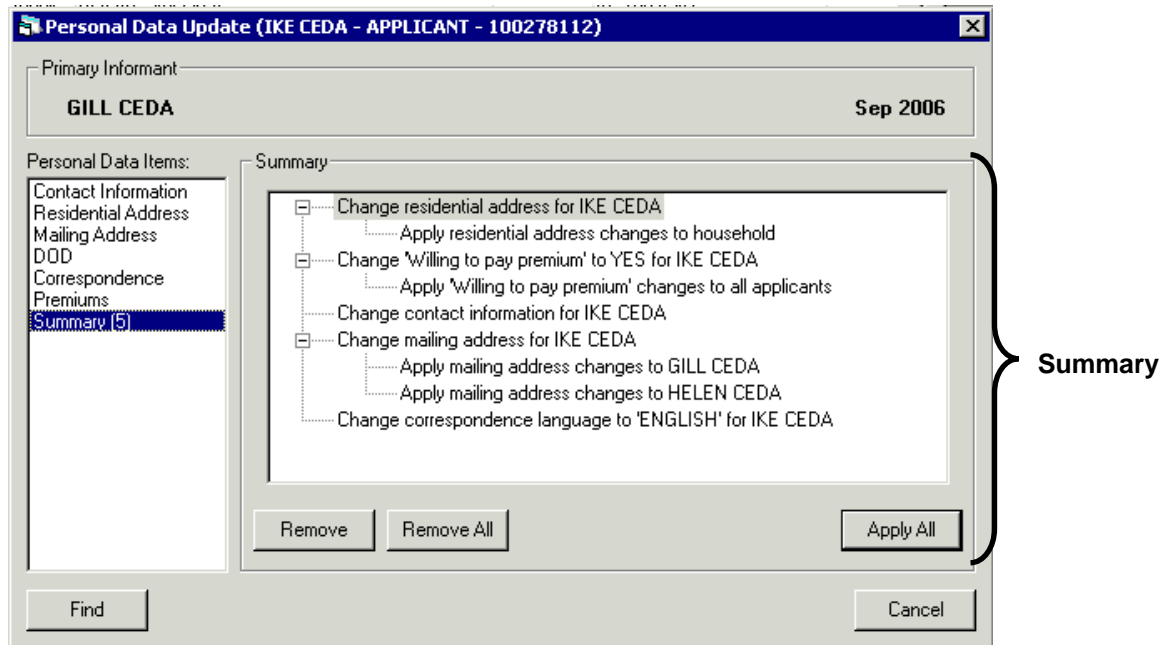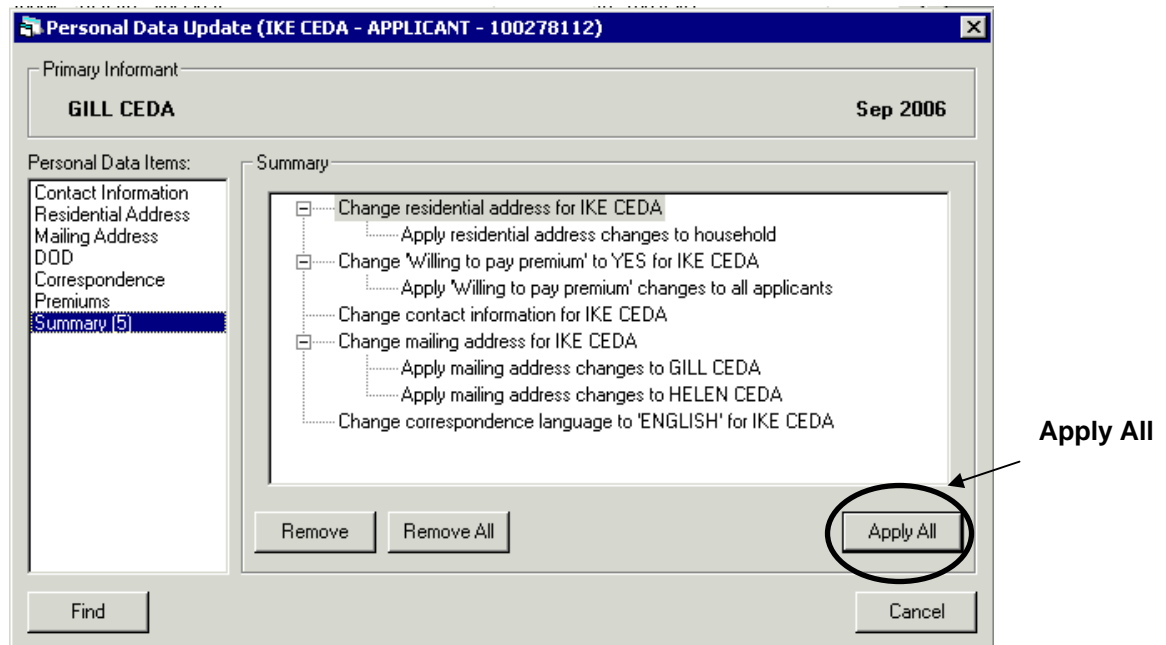
If there is a change on the summary you would like to remove, click on the change and click the **"Remove"** button.
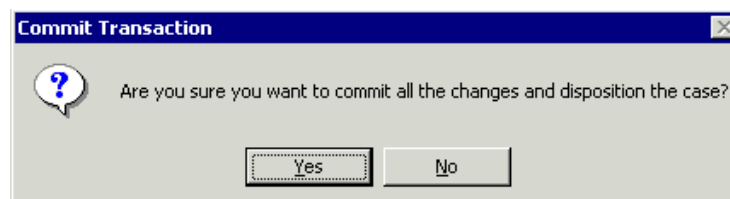

If you would like to remove all the changes, click on the **"Remove All"** button.
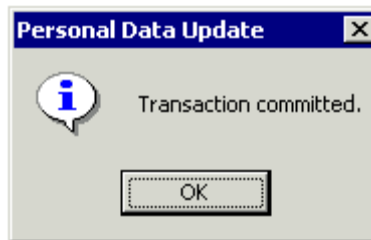
Remove All

Once you have all the changes that need to be applied on the **"Summary"** grid, click on the **"Apply All"** button.

Apply All

Once you click the **"Apply All"** button, a pop-up window asks whether you would like to apply the changes.

If you click **"No"**, none of the changes will be applied. If you click **"Yes"**, another pop-up window will state **"Transaction Committed"**.

Once the **"Remove All"** or **"Apply All"** button is pressed, there will be no changes on the **"Summary"** grid.